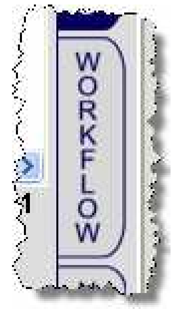
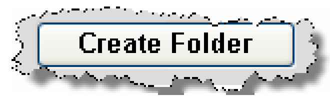
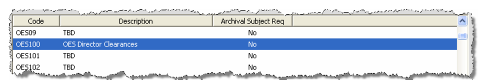
Creating Workflows

The following steps allow you to create workflows in ECM. Workflows are used to assign the tasks and subtasks for a folder to individuals and groups. This job aid details how to create a new Workflow for a folder.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the **Workflow** tab.	
2.	Select **Change Workflow**.	
3.	Select **Add** to create a new task for the new Workflow.	
4.	Complete the task-specific information, including **Task** (name), **Assignee**, **Floating Days to Complete**, **Due Date**, **Approval**, **Notification**, and **Informational**.	
5.	Select **Save & Return** to save and add the task to the Workflow.	
6.	Continue using **Add** to create new tasks to complete the Workflow.	
7.	Select **Update & Return** to save and implement the Workflow and return to the folder.	

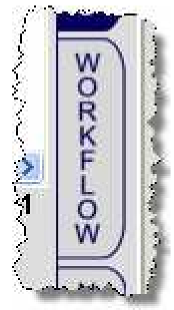
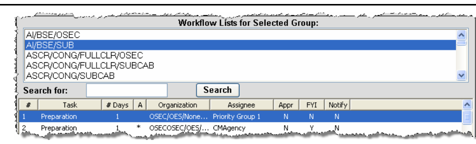
Add Existing Workflows: Workflows with Processing Codes

The following steps allow you to add an existing workflow to a folder in ECM. Workflows are used to assign the tasks and subtasks for a folder to individuals and groups. Workflows may be saved using a Processing Code (PC), which can then be assigned to Work Folders. Once a Workflow with a PC has been added to a folder, it can then be modified to meet any specific needs the folder requires.

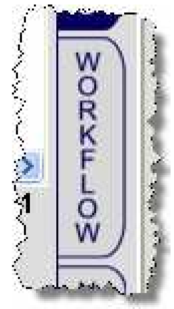
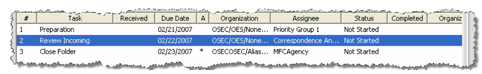
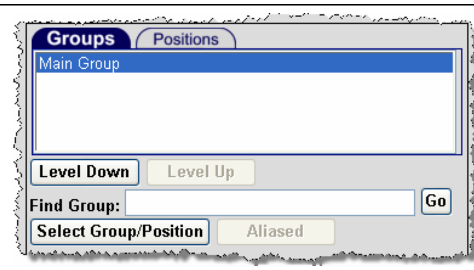
Step	Action	Look For
1.	From the ECM Main Menu, select **Create Folder** to create a new folder.	
2.	Complete the folder information, and then select **Create Folder**.	
3.	Click the Processing Code select icon.	
4.	Highlight the **Processing Code** you wish to use for the folder.	
5.	Click **Select**.	
6.	Select **Save** to save the Folder and Workflow that has been added.	
7.	If you wish to make changes to the Workflow, select the **Workflow** tab.	

Add Existing Workflows: Workflows from the Workflow Library
The following steps allow you to add an existing workflow to a folder in ECM. Workflows are used to assign the tasks and subtasks for a folder to individuals and groups. The Workflow Library provides many predefined Workflows, which can be assigned to Work Folders. This job aid details how to assign a Workflow to a Folder from the Workflow Library.

Note: This process may be performed by creating a new folder or using an existing one. For this job aid, an existing folder is used.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the **Workflow** tab.	
2.	Select **Change Workflow**.	
3.	Select **Insert from Library** to display the Select Workflow List screen.	
4.	Use the available filters to narrow the list of Workflows displayed, if desired.	
5.	Highlight the desired Workflow from the Library list.	
6.	Click **Select List**. The tasks associated with the Workflow are now added to the folder's Workflow.	
7.	Select **Update & Return** to save the Workflow and return to the Folder.	
8.	If you wish to make changes to the Workflow, select **Workflow**.	

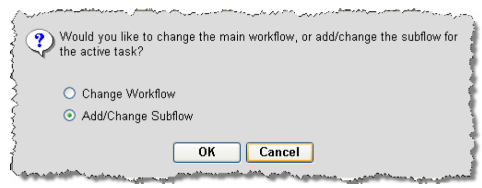
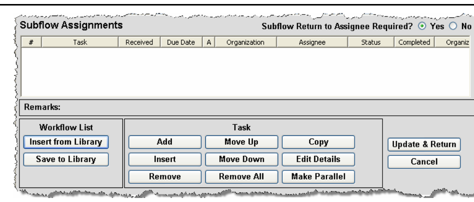
Add Steps to a Workflow
The following steps allow you to add steps, or tasks, to an existing Workflow.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the **Workflow** tab.	
2.	Select **Change Workflow**.	
3.	Highlight a task within the Workflow that you wish to have the new task follow.	
4.	Select **Insert**. The Add/Change Task screen is displayed.	
5.	To add a new task, select a task name from the **Task** drop-down menu or type a new task name in the text box.	
6.	Click **Select Assignee** to assign an individual or group to complete the task.	
7.	Locate the desired individual or group using the List or Tree view, and then select **Group/Position** to assign a task assignee.	
8.	Complete the Days to Complete, Approval, Notification, and Informational options.	
9.	Select **Save & Return** to add the task to the Workflow.	

Step	Action	Look For
10.	When all new tasks have been added to the Workflow, select **Update & Return** to return to the main folder. The updated workflow, with newly added tasks, is shown in the Workflow tab.	

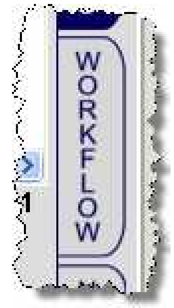
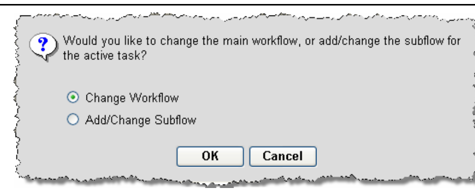
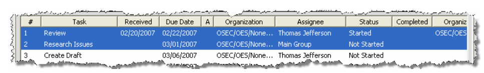
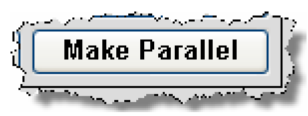
Adding Subflows to a Workflow

The following steps allow you to add subflows to an existing Workflow. Subflows are added to a task by the individual or group member who is assigned the task.

Step	Action	Look For
1.	From the ECM Inbox, highlight the task you wish to work on and add a subflow to.	
2.	Click **Select Task**.	
3.	Highlight the task you wish the subflow to follow, and then select **Change Workflow**.	
4.	Select **Add/Change Subflow**, and then select **OK** in the pop-up window. The task list that appears at the bottom of the screen that displays is the workspace for adding the subflow tasks.	
5.	Follow the same steps for adding a subflow that were used for adding tasks to a standard Workflow.	
6.	Select **Add** to include the task in the subflow.	
7.	Select **Save & Return** to continue adding additional steps to the subflow.	
8.	Select **Update & Return** to save the subflow and go back to the main folder. The Task List now displays the subflow tasks.	

Making Tasks Parallel in a Workflow

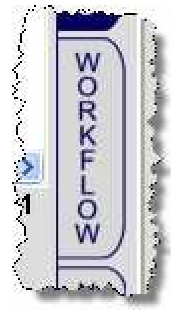
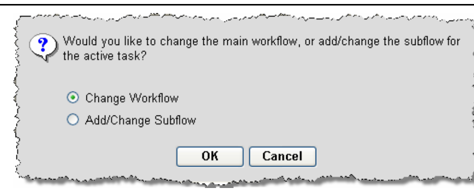
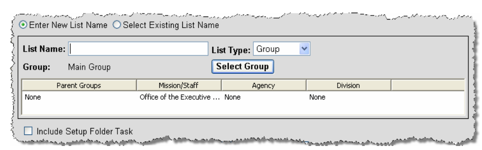
The following steps allow you to make tasks parallel in an existing Workflow.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the **Workflow** tab.	
2.	Select **Change Workflow** to open the Workflow Editor screen.	
3.	In the pop-up window, select **Change Workflow** and then **OK**.	
4.	Highlight the tasks you wish to make parallel. Hold **CRTL** and use the mouse to select each task.	
5.	Select **Make Parallel**. When the Parallel Tasks screen displays, verify the number of tasks shown are correct.	
6.	Select **Change** to complete making the tasks parallel in the Workflow. Note that the tasks are now assigned the same task number.	

Note: To make parallel tasks no longer parallel, highlight one of the parallel tasks and then select Move Up or Move Down, depending on the order you desire for the tasks.

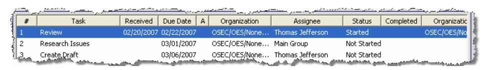
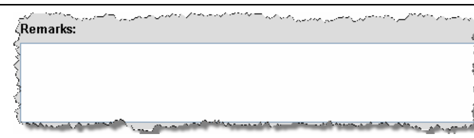
Saving a Workflow to the Library

The following steps allow you to save a Workflow to the Workflow Library. New workflows or modified versions of existing workflows that are likely to be used again should be saved to the Workflow Library.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the **Workflow** tab.	
2.	Select **Change Workflow** to open the Workflow Editor screen.	
3.	In the pop-up window, select **Change Workflow** and then **OK** to work with the main Workflow.	
4.	Select **Save to Library** from the Workflow List. The Save Workflow List screen is displayed.	
5.	Complete the information options, including **Enter New List Name**, **Select Existing List Name**, **List Name**, **List Type**, **Select Group**, and **Include Setup Folder Task**, as appropriate.	
6.	Select **OK** to save the Workflow to the Workflow Library. When the Workflow Editor screen has displayed, ECM has saved the Workflow to the Workflow Library.	

Completing a Task

The following steps allow you to mark a task as complete. When a task is complete, it must be marked complete before the next task in the Workflow can move forward.

Step	Action	Look For
1.	From the ECM Inbox, highlight and then click **Select Task** to open the task.	
2.	Select the task from the Task List.	
3.	Select **Complete Task**.	
4.	Type any notes in the Remarks field on the Complete Task screen, if desired.	
5.	Select **Complete Task**. Note: If the next task in the Workflow is assigned to you, a pop-up window will appear asking if you wish to select the next task to work on.